

Employee Maintenance System



Enterprise Technology Solutions
Education and Career Development Division
Participant's Manual

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Chapter 1: The Employee Maintenance System

General Overview

Introduction This class includes explanations and activities designed to teach important topics in the IFAS Employee Maintenance module. The Participant's guide and the User's guide present information and procedures to follow for navigating and completing the Employee Maintenance tasks.

Goals The following are the goals for today.

- To understand the data entry requirements for Employee Maintenance.
- To interact with the components of the Employee Maintenance module.

Use this manual for reference and completing exercises.

Objective After completing this section, you will be able to describe the structure of this manual and the components of the class.

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Structure of the Participant's Manual

Introduction

The purpose of the Participant's manual is to take you through required fields on the screen and the processes used in EM.

Components

Chapters in this manual contain learning objectives that you should be able to achieve after following the instructions and information in this Participant's Guide. There are procedures, explanations, and review questions in the participant's manual.

User's Guide

For your reference, a User's Guide is provided. It contains step-by-step procedures for tasks in Employee Maintenance.

The Class

Introduction There are four distinct parts of the class.

- System Overview
 - Screens and Fields
 - Review
 - Practice
-

Content Each chapter in this Participant's Guide has its own objectives. The screens for the Employee Maintenance module are discussed in detail with special attention to the required fields.

You will have opportunities to answer questions about details on each distinct screen.

Chapter 2: Employee Maintenance (EM) System: EMPMSTR

Overview

Introduction The IFAS Employee Maintenance (EM) module maintains data that is required by the Payroll and Daily Time Entry (DTE) systems.

Purpose In EM, you will assign a unique identity for the employee, including pay assignment and the deductions from his/her paycheck. The EMPMSTR screen is the first in the series of screens.

Objectives After completing this chapter, you will be able to:

- Identify the Personnel Action Code.
- Identify which IFAS modes to use for the Personnel Action Code.
- List all required fields on the EMPMSTR screen.
- Identify what to do in the event of an error is made in the employee's Social Security number.
- Identify System generated fields on the screen.
- Describe the use of the Entity field.
- Describe when a prefix is needed for the Employee Identification Number.
- Identify fields used to establish an address for the employee.
- Explain the use of the approval code entered by Payroll.

In this section The foundation of the Employee Maintenance module is assigning an identity to an employee. Discussion of this function begins in this chapter.

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Establishing an Employee Identification

Introduction

The identification number and the remaining fields on EMPMSTR screen will set up the employee's identification to receive a paycheck.

Getting a Unique Identity- ID number

Refer to Fig. 1 for the EMPMSTR screen. To enter the module, select CS: Client Specific, HR: Human Resources, EM: Employee Maintenance. The EMPMSTR screen appears. The following fields are required.

Field	Function
Personnel Action Code	<p>This field gives an identification of the record and is required. The pick list associated with this field is made up of four items. Choose the appropriate one.</p> <ul style="list-style-type: none">• New (establish a new record)• Roll (information was brought in from the old system)• Fix (needs to be edited from the old system)• Update (to change the record after it has been approved by the auditor's Payroll Department) <p>This code will default to all other screens in the Employee Maintenance series.</p> <p>Note: If you are using NEW as the Personnel Action Code, you must be in the ADD mode of IFAS. If you are using Update in the code, you must be in the BROWSE mode.</p> <p>All changes are stored in a system history.</p>
Employee Social Security No.	<p>The Social Security number is carried over to all other screens and is required. You cannot go back and change this number. Call the Auditor's Payroll Department to change or delete the record, if there has been an error with its entry.</p>

Employee Master Information		EMPMSTR		Train B	
Personnel Action Code:		NEW	ADD NEW RECORD		
Employee Social Security No.:			Entity:		Req. No.:
Generate the ID:			Employee ID Number:		
Note:					# Rec's:
Employee Last Name	Employee First Name	Middle Name	Suffix	Salutation	
Full Name:		Birth Date:		Age:	
Former Name:		Preferred First Name:			
Type/Status:		HR:	A	PY:	A
ADDRESS INFORMATION					
Publ./Priv.:					
Primary Addr.:					
Zip Code:					
City:		State:	Country: US		
PhoneCD:	#:	Ext:	PhoneCD:	#:	Ext:
E-Mail:					
Approval Code:		WAIT		View Assoc. Detail:	
JserID	TRAINB	Updated	2007-12-20 08:24:26	Today	2007-12-20 00:00:00
Module:					
Help		Options	Screen	Add	Prev
		Next	Browse	Exit	
Enter a personnel action code. Press F1 for a listing.					

Fig. 2-1 EMPMSTR

Establishing an Employee Identification, Continued

Getting a
Unique Identity
- ID number
(cont'd)

Field	Function
Entity	<p>Enter this field by choosing from a pick list. Press F1. Options are:</p> <ul style="list-style-type: none">• E911 is Emergency 911• FCTL is Flood Control• ELEC is Election Worker• CSCD is Harris County Supervision and Correction• ROOT is all others <p>This field will define the default entity for other IFAS screens.</p>
Generate the ID and Employee ID Number	<p>You do not have access to this field. When you tab out of the Entity field, the cursor goes immediately to the Employee ID Number field. This ID number field is then populated by the system with the employee's ID.</p> <p>If the Entity is ROOT, the Employee ID Number (EID) will populate the Employee ID Number field. If the Entity is not ROOT, the EID will appear with a prefix, as follows:</p> <p>For E911, N For FCTL, F. For ELEC, E. For CSCD, C</p> <p>For example, if a new employee is assigned to the Flood Control department, his EID would be F#####, where ##### is the EID.</p> <p>Note: The letter R in front of the EID may appear. This is for retired employees and cannot be changed.</p>

Continued on next page

Establishing an Employee Identification, Continued

Getting a Unique Identity - Name

The EID is a unique number that identifies the employee. It is not the Social Security number. The Social Security number will still be used and the field remains on the screen.

The remaining fields deal with naming information. The required fields follow.

- Last name
- First name
- Birth date
- Type/Status*

*The Type/Status field designates the kind of employee, full time (32+) or part time. Select F1 for a pick list.

Address and Contact Number

Introduction The employee's address and contact information is recorded in the Address Information section.

Getting a Unique Identity – Address **All fields are required** with the exception of the e-mail address and extension of the phone number.

The employee has an option to allow his/her address and phone number to be shared throughout the county. If he/she has chosen this option, enter PUBL, if not, enter PRIV.

Required fields follow.

Primary address
Zip Code
City
State
Country
Phone CD *

*The phone code defines the type of phone number indicated. Press F1 for a pick list.

Approval Code Approval by Auditor's Payroll Department (**Wait** indicates no approval yet; **Send** indicates approval). There are cutoff dates for the information on this screen to appear in DTE. If you do not see **Send** in this field and the Maintenance End Date is approaching, call the Auditor's Payroll Department immediately.

Remaining Fields The remaining fields are system derived.

Chapter 3: EMPMSTR2

Overview

Introduction EMPMSTR2 is an Employee Maintenance supplemental screen, used to establish a record for the new employee. Choose this screen by pressing F4.

Purpose This screen is used to record primary employee information, date information and EEO data

Objectives After reading this chapter, you should be able to

- Describe the required fields for this screen
- Define EEO information.
- Identify how HR and PY fields are used for identification.

Contents This part contains the following topics:

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Primary Date Information Section	19
EEO Classification Section	20
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Defaulted Information in the Header

Introduction

There are four sections on the EMPMSTR2 screen: the header, Primary Information, Primary Date Information and EEO Information.

Defaulted Header Information

The following fields in the header are defaulted. Data is derived from the EMPMSTR screen.

- Personnel Action Code
 - Entity
 - Employee ID number
 - SSN
 - Employee Name
 - Type
 - HR
 - PY
 - Notes
 - # Rec's
-

Employee Master Supplemental		EMPMSTR2		Train B	
Personnel Action Code: 					
Entity	Employee ID	SSN	Employee Name		Type HR PY
:					
Notes:				# Rec's:	
PRIMARY INFORMATION				Cred. Holder?:	
BargUnit:				NCLB Credential?:	
Calendar:		DaysWrk'd:	PerdWk:	Sal Ann:	
FTE:	Bene FTE:	Pay Cycle:	Per'd Paid:	PCN Info:	
Dist:		Loc:		FLSA:	
Dept:		Div:		Day Ptch:	
PRIMARY DATE INFORMATION					
Hire:	Orig. Hire:	DOB:	Age:		
Dist. Sen.:	POS/PCN Sen:	Long:	Lump Sum Pay:		
Term Dt/Cd:	/	2	Def. Pay: -		
Last Pay:	Last Day Worked:	Df:	39MnthExp:		
EEO INFORMATION					
EthnicCD:	Veteran:	Gender:	MRT:		
Disable:	ReasAcm:		Over 40?:		
Approval Code:		View Assoc. Detail:			
User ID:	Updated:	Today:			
Help	Count	Cancel	All	Select	Global Summary Exit
Enter a personnel action code. Press F1 for a listing.					
Enter search criteria on form then hit Enter					

Fig. 3-1 EMPMSTR2

Primary Information Section

Introduction The Primary Information section includes definition of payment, delivery of check and work calendar set up.

Primary Information The following must be completed manually.

Field	Function
Barg Unit	This is a primary Bargaining Unit; most often it will be H for Hourly. Press F1 to select from the pick list.
Calendar.	It shows the number of hours per week, the number of hours per day and the number of days per week. Press F1 to display a pick list of possible codes to enter.

Note: The calendar must match the employee's Type as indicated on EMPMSTR; that is, R32+ must have a calendar of 32 hours or more. If the position is a Secondary Position, it is associated with the Calendar in the PCNTBLE2 screen. If a change is required, contact the Auditor's Payroll Department for edits.

Field	Function
Day's Wrk'd	A zero must be typed into this field.
Perd Wk	A zero must be typed into this field.

Continued on next page

Primary Information Section, Continued

**Other fields in
the Primary
Information
section**

These are remaining required fields in the Primary Information section that must be completed.

Field	Function
FTE	Type one (1) in this field. It is used to calculate the Pay Assignment Effort.
Pay Cycle	This indicates when an employee is paid. Press F1 for a pick list to choose from.
Per'd Paid	Type zero (0) in this field
Dist.	This indicates where the paycheck needs to be sent. A pick list gives options. Press F1 for code.
Loc.	Not used by Harris County
FLSA	Type N for an exempt employee or Y for a non-exempt employee.
Dept	This contains the department where the employee works.
Division	This code indicates the primary division for the employee.

Primary Information Date Section

Introduction This section of the screen contains one required field, the employee's current hire date.

Primary Date Information Hire dates may differ from the original hire dates if employees are returning to work from a leave or transferred to another department.

Enter the current hire date. The current hire date determines when the employee will be active for the payroll processing. If it is not the correct date (does not fall into the current pay period), the employee will not be paid for that pay period.

Note: Orig. Hire, DOB and Age, Dist. Sen, POS/PCN, and Long are system generated fields.

The following fields are **not** applicable:

- Lump Sum Pay
 - Term Dt/Cd. This field will be completed only if the employee is terminated; it is system generated.
 - Last Pay. This field will be completed only if the employee is terminated; it is system generated
 - Last Day Worked. This field will be completed only if the employee is terminated; it is system generated.
 - Def. Pay
 - Df
 - 39 MnthExp
-

EEO Classifications Section

Introduction

The EEO section of the EMPMSTR2 screen contains only three required fields. These fields classify the employee for ethnicity, gender and marital status.

EEO Information

The following fields are required in the EEO section of the screen:

Field	Function
EthnicCD	Identifies ethnicity. Use a pick list to choose. Press F1.
Gender	This is a required field. Use M or F.
MRT	This is a required field, indicating marital status. Press F1 for a pick list.

EMPMSTR and EMPMSTR2 Screen Review

Write the answers to the following questions in the space provided.

1. The Entity, "Root," designates the department Entity code. Which departments does it include?
2. Which Entity code is used for Flood Control?
3. What do you need to do if you make a mistake on the employee's Social Security number?
4. On the EMPMSTR screen is the birth date required or optional?
5. For the HR and PY fields on the EMPMSTR screen, what does the system generate?
6. Give a reason why the Hire date and the Original Hire dates can be different from one another.
7. When WAIT occurs in the Approval Code on a screen, what does it mean?

EMPMSTR and EMPMSTR2 Screen Review

Answers

1. All departments except Emergency 911, Flood Control and Election Worker.
2. The entity code for Flood Control is FCTL.
3. Social Security numbers cannot be edited by Departments. You must call the Auditor's payroll department.
4. To establish an identity, the birth date is required on the EMPMSTR screen.
5. The system generates A for both the HR and PY, indicating Active.
6. If an employee is transferring to another department, the original hire date remains and the Hire date refers to the new assignment. This applies for retired employees and those who have returned to work at the county.
7. WAIT means that the record has not been accepted by the Auditor's payroll Department.

Chapter 4: EMPMSTR3

Overview

Introduction This screen is supplemental to EMPMSTR. It contains only four (4) fields that are required.

Purpose EMPMSTR3 sets up a record for the employee that identifies his/her division (funding source), birth location and citizenry.

Objectives After completing this chapter, you will be able to:

- Identify required fields on the screen.
- Give a field relationship between EMPMSTR2 and EMPMSTR3.
- Describe approval codes.

Contents This chapter contains the following topics:

Topic	See Page
Required Fields for EMPMSTR3	24
System Derived Fields for EMPMSTR3	25
EMPMSTR2 and EMPMSTR3	26

Required Fields for EMPMSTR3

Introduction

There are only three required fields on this screen with one conditional field. The others that appear are either system generated, not applicable, or optional.

Data Used for Payroll

These are the fields that must have entries:

Part	Function
Sel Cd2	This field contains a code based on the employee's division. It allows information to be transferred to DTE. This code must match the division code on EMPMSTR2.
Birth Locn	The employee's birthplace is indicated here.
Ctzn Cntry	The country where the employee is a citizen.

Note: There is one character field that must be completed if the employee receives a **pay card**. This is number 16 in Character Fields, the mother's maiden name.

Employee Master Miscellaneous EMPMSTR3 Train B

Personnel Action Code: []

Entity Employee ID SSN Employee Name Type HR PY

Notes: # Rec's:

Educ Cd1: 2: Skill Cd5: Sel Cd2: Misc Cd1:

Seniority Adj: Birth Locn: Ctzn Cntry:

Miscellaneous HR/PY Fields

Character Fields				Date Fields		Numeric Fields	
1:	2:	17:	18:	1:		1:	
3:	4:	19:	20:	2:		2:	
5:	6:	21:	22:	3:		3:	
7:	8:	23:	24:	4:		4:	
9:	10:	25:	26:	5:		5:	
11:	12:	27:	28:	6:		6:	
13:	14:					7:	
15:	16:	11111111112222222222333				8:	
		#12345678901234567890123456789012				9:	

PY Emp Switches: Apprv Cd:

User ID: Updated: Today:

[Help] [Count] [Cancel] [All] [Select] [Global] [Summary] [] [Exit]

Enter a personnel action code. Press F1 for a listing.

Enter search criteria on form then hit Enter

Fig 4-1 EMPMSTR3

System Derived Fields for EMPMSTR3

Introduction

The system will take data from EMPMSTR and EMPMSTR2 and populate certain fields.

Additional Information for the Payroll System

The following are system derived fields:

- Personnel Action Code
 - Entity
 - Employee ID
 - SSN
 - Name
 - Type
 - HR, PY, Note and # Rec's
 - Notes
 - Apprv Cd.
-

EMPMSTR2 and EMPMSTR3

Introduction	There are several things to consider when contrasting EMPMSTR2 and EMPMSTR3. This section includes these.
Important Information	If the employee has worked at another location (division or department) in Harris County, you must be sure that the Division code on EMPMSTR2 screen is the same as the 2 field in EMPMSTR3. If not, the employee will not appear in the DTE.
Calendars in	The Calendar in EMPMSTR2 is associated with the primary position. If a position is a Secondary Position (part time), it is associated with the Calendar in the PCNTBLE. If a change to the Secondary Position Calendar is required, departments must contact the auditor's Payroll Department.
Editing	When you enter the system to edit a field in EMPMSTR2 or EMPMSTR3, do the query (F3) in the EMPMSTR screen. Pull up the employee record and then move to EMPMSTR2 (F4). After the change, save the record and go to EMPMSTR3 through F4. Make the change and save.

Chapter 5: I9INFO: I9 Information Screen

Overview

Introduction This screen contains information used in conjunction with the Federal Government’s I9 form.

Purpose This is a required screen that supplies information about immigration and naturalization tracking. See Figure 3 that follows.

Objectives After completing this chapter, you will be able to:

- Describe the I9 information screen.
- Give the purpose of the screen.
- List the required fields for the I9INFO screen.

Contents This chapter contains the following topics:

Topic	See Page
Information Fields for I9INFO	28
Screen Review	30

Information Fields for I9INFO

Introduction	Fields establish U.S. citizenship, or a valid driver's license and Social Security number.
---------------------	--

First Field Required	The Personnel Action Code identifies the purpose of the record and is required. It is identical to the same field on EMPMSTR, EMPMSTR2 and EMPMSTR3.
-----------------------------	--

Lists	There are three lists on the screen with codes. Codes are options from the F1 key.
--------------	--

If you fill out the A list (US Citizenship documentation), leave B and C empty. If you fill out B (driver's license) and C (Social Security card), leave A empty. The driver's license number and Social Security number are used in the corresponding Document No. fields.

Continued on next page

Information Fields for I9INFO, Continued

I9 Information Screen		I9INFO		Train B	
Personnel Action Code: <input type="text"/>					
Entity	Employee ID	SSN	Employee Name	Type	HR PY
:					
Notes:				# Rec's: ---	

Code:

Expiration Date:

Code:

Expiration Date:

Code:

Expiration Date:

List A.
Document No.:
List B.
Document No.:
List C.
Document No.:

Complete?:	Status:	Extend:	Hire:
------------	---------	---------	-------

User ID: Updated: Today:

Enter a personnel action code. Press F1 for a listing.
Enter search criteria on form then hit Enter

Fig.5-1 I9INFO

Remaining Fields

The remaining fields on this screen are system generated or Optional. For example, the hire date defaults from the EMPMSTR2.

EMPMSTR 3 and I9 Screen Review

1. What is the purpose of the I9 Screen?
2. If you provide the Driver's license document number, what other identification must you provide: Certificate of US Citizenship? Social Security number? Or birth location?
3. The entry for the Division Code field on the EMPMSTR2 screen is also used in the _____ field on the EMPMSTR3 screen.
4. What system derived field for the I9 screen is derived from EMPMSTR2?
5. With what condition do you complete #16 on the Character Fields for the EMPMSTR3 screen?

EMPMSTR 3 and I9 Screen Review

Answers

1. The purpose of the I9 screen is to house information for the Federal Government's I9 form. It is used for immigration and naturalization purposes.
2. Include the Social Security number.
3. It is the same as the 2 field
4. The hire date comes from the EMPMSTR2 screen.
5. The employee must receive a pay card for this field to be completed. This entry is the employee's mother's maiden name.

Chapter 6: PayAlt

Overview

Introduction For this screen, you will have to calculate the hourly salary for the employee.

Purpose This screen lets the Payroll system know how much an employee is being paid and what position he/she is assigned. It also relates the funding sources for posting the information into the ledgers.

Objectives After completing this chapter, you will be able to:

- Identify the three-fold purpose of the PAYALT screen.
- Distinguish between a Primary and a Secondary position.
- Identify the required fields on the PAYALT screen.
- Identify the three components of the PCN number.
- Describe how the model number in IFAS is derived.
- Identify the pay classes defined in the IFAS system.
- Calculate the hourly rate for an employee receiving a monthly salary and is paid bi-weekly.
- Describe how to populate and save the Show/Edit Dist. Field.
- Describe how to receive PAYALT data expressed in an Excel format.

Contents This chapter contains the following topics:

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The PAYALT Screen

Introduction	This section classifies the employee with respect to position and salary
Three fold purpose	The PAYALT screen is required to let the Payroll system know how much an employee is being paid, what position he/she is assigned and the what funding sources will be used for posting.

```

Pay Line Entry-Alternate Scrn.      PAYALT      Train B
----- Personnel Action Code: 
Entity Employee ID      SSN      Employee Name      Type  HR  PY
:
--- PY Stat:      --- As of Date:      --- # Rec's:
Reason Code:      Fiscal Year:
Record Type:      Special Function:
PCN:      + Pos:
Effective Dates:      -      Department:
Pay Class:      St:      Fq:      Bx:      Bargaining Unit:
Override Days/Hours/Periods:      Division:
Days/Year:      Hrs/Day:      Perd Tp:      Perds:
PCN FTE:      /Total FTE:      = Effort:
Reg Rate:      Prorate Sal:      Index:
Override Salary:      Annual      Per Period      Daily      Hourly
Re-Calculate:
Budget Override:      Spec Cd1:      Misc 1:      Num 1:
                        Spec Cd2:      Misc 2:      Num 2:
Notes:
Show/Edit Dist.:      Approval Code:
User ID:      Updated:      Today:
[Help] [Count] [Cancel] [All] [Select] [Global] [Summary] [Exit]
Enter a personnel action code. Press F1 for a listing.
Enter search criteria on form then hit Enter
  
```

Fig. 6-1 PAYALT

Required Fields

Introduction

A total of nine fields are required on the PAYALT screen.

Required Fields and functions

Field	Function
Reason Code	This represents the reason the assignment is being made. It is required. A pick lists displays selections; however, HR for hire or SC for salary change occur most often.
Record Type	The Record Type indicates the pay assignment for the employee. PM indicates the Primary assignment; R0, S0, T0 are secondary (part time) assignments.
PCN	<p>The numbering system for a regular PCN consists of a department number (3 digits) a Job code number (4 digits) and a sequence number (3 digits). You may get the code from a list by pressing the F1 key.</p> <p>A Model Position can be a Primary or Secondary position. It has a PCN number that is different from the Primary or regular position; that is, the model has a 3 digit Department number, a four digit Job number, and a two digit sequence number that is preceded by a alpha character (starting with M - V).</p> <p>In general, a model position has been structured for a time and a half pay rate. Some examples are: library positions, Constable for grants, summer interns, commissioners for disaster, temporary personnel or seasonal work.</p> <p>Note: If the position is a model, enter the model number manually.</p>

Note: If you make an error in the PCN field and press Enter twice to save, you cannot go back in and change the PCN. The record will have to be deleted by the Auditor's Payroll Department.

Continued on next page

PAYALT: Record Types

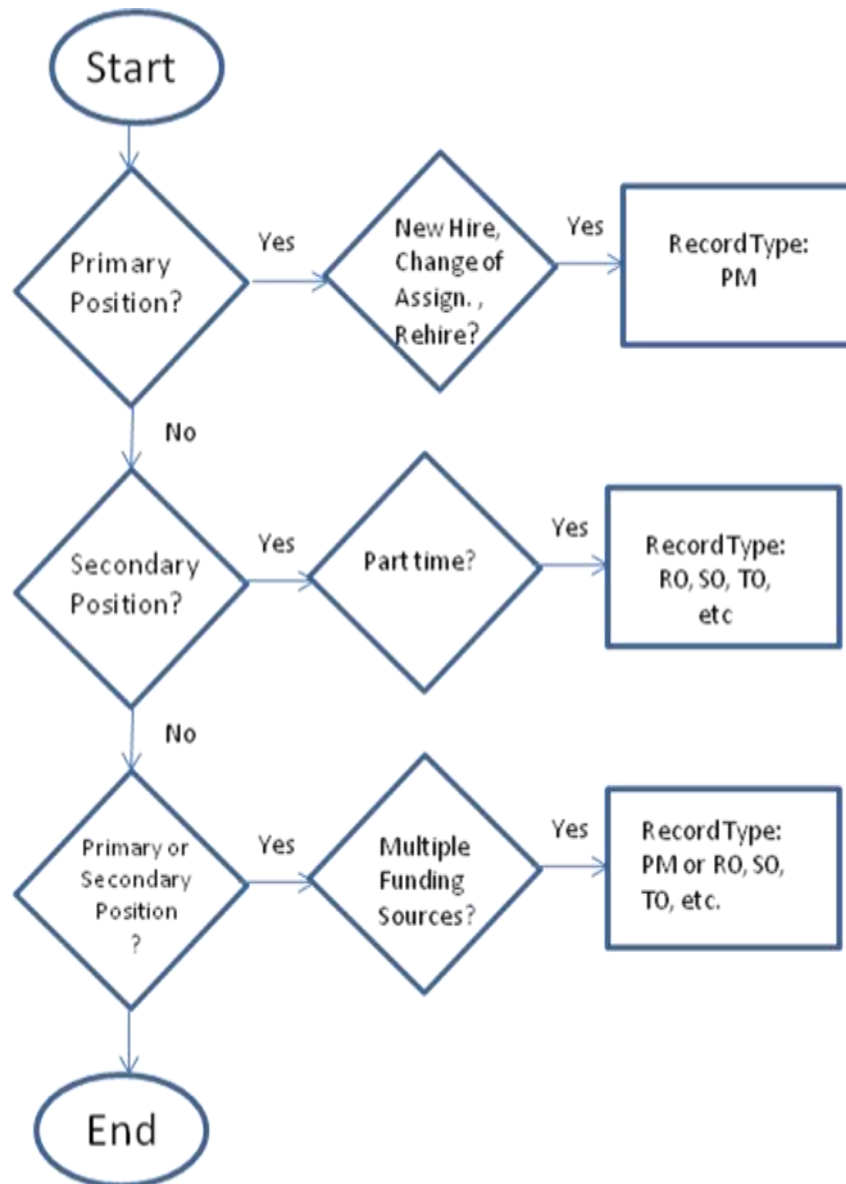


Fig. 6-2 Record Types

Required Fields, continued

Required fields and functions (cont'd)

Field	Function																		
Effective Dates	<p>Effective Dates refers to the dates for the assignment. For a new employee, it is the Date of Hire to 12/31/2050.</p> <p>For changes, you must end the assignments in order to create a new one. In this case, you will change the hourly pay, if necessary, on PAYALT. You would change the position number on PAYALT. Finally, the funding source would change by editing the Division field on EMPMSTR2 and PAYALT. The beginning date would be the first day of the current pay period and the end date would be 12/31/2050.</p> <p>For terminations, the End date is the last day of work.</p>																		
Pay class	<p>This is used to group employees who get similar benefits such as vacation, funeral and comp/overtime.</p> <p>Note: Pay classes are related to the hours in Calendar and match the Employee Type. See examples below.</p> <table> <tr> <th>Job</th><th>Pay Class Function</th></tr> <tr> <td>Certified Peace Officer</td><td>420 for 32+ 430 for 32- 100/110</td></tr> <tr> <td>Exception</td><td></td></tr> <tr> <td>Regular Worker</td><td>400 for 32+ 410 for 32- 100/110</td></tr> <tr> <td>Exception</td><td></td></tr> <tr> <td>Part time</td><td>440 May have 100/110</td></tr> <tr> <td>Temporary</td><td>450</td></tr> <tr> <td>Secondary</td><td>460</td></tr> <tr> <td>Retired</td><td>Follow the rules above</td></tr> </table>	Job	Pay Class Function	Certified Peace Officer	420 for 32+ 430 for 32- 100/110	Exception		Regular Worker	400 for 32+ 410 for 32- 100/110	Exception		Part time	440 May have 100/110	Temporary	450	Secondary	460	Retired	Follow the rules above
Job	Pay Class Function																		
Certified Peace Officer	420 for 32+ 430 for 32- 100/110																		
Exception																			
Regular Worker	400 for 32+ 410 for 32- 100/110																		
Exception																			
Part time	440 May have 100/110																		
Temporary	450																		
Secondary	460																		
Retired	Follow the rules above																		

Continued on the next page

Required Fields, continued

Required Fields and functions (cont'd)

Field	Function
PCN FTE	PCN FTE is a required field. It indicates how much of the work effort is spent in each position. For Primary Positions, enter 1.00. For secondary positions, enter .0001.
Override Salary	Enter Y

Salary Information

Introduction

The Salary field on the PAYALT screen is for hourly rates.

Salary field

Salary amounts are required and are expressed as a number without a dollar sign. Use these rules to complete this field for employees paid biweekly (pay cycle of 01 or 04)

- The annual will default to 0.
 - Per Period will default to 0.
 - Daily defaults to 0.
 - Calculate the hourly rate as indicated below.
-

Calculating Salary Information for Biweekly Pay

Step A) Calculate an Annual Salary Amount by multiplying the Monthly Wage by 12 months.
Step B) Calculate the Biweekly rate by dividing the Annual Salary Amount by 26.
Step C) Calculate the hourly rate by dividing the Bi-Weekly Rate by 2 times the required hours per week. The required hours value is the same as the required hours found on the Calendar field in EMPMSTR2.
Step D) Round the hourly rate to two decimal places.

Remember, the hourly rate does not have a dollar sign.

Calculating Salary Information for Monthly Pay

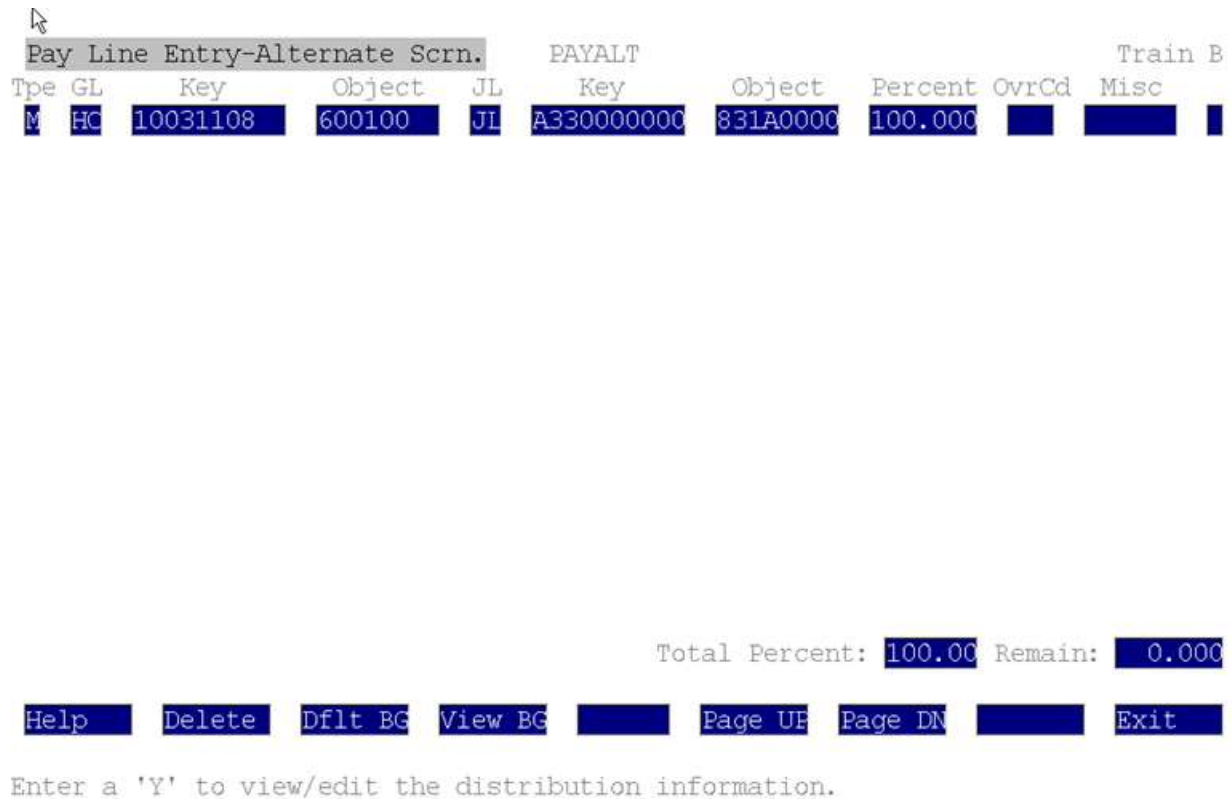
For a Monthly Pay Cycle of (03), follow these steps.

Step A) Calculate the yearly salary by multiplying the monthly salary by 12 months.
Step B) Calculate the hourly wage by dividing the yearly salary by 2080 hours

Distribution

Introduction The Show/Edit/Dist field is required and expresses funding information.

Show/Edit Dist When typing in a Y for this field, the user will see established distribution information for the employee on a separate screen. To populate this distribution with default funding source information, press F3. To save this data on screen, press Enter. To save the screen, press Enter twice.



Pay Line Entry-Alternate Scrn. PAYALT Train B

Tpe GL	Key	Object	JL	Key	Object	Percent	OvrCd	Misc
M	HC	10031108	600100	JL	A330000000	831A0000	100.000	

Total Percent: 100.00 Remain: 0.000

Help Delete Dflt BG View BG Page UP Page DN Exit

Enter a 'Y' to view/edit the distribution information.

Fig. 6-3 Pay Line Entry – Fund Source

Excel Files

Introduction You can request data in an Excel format.

Requesting the Excel file After saving the Show/Edit Dist. Field by pressing Enter three times, send an e-mail to the IFAS OPER to request the Excel file.

You should specify who gets the file and whether this information should be sent every pay period or just upon request.

PAYALT Screen Review

1. What must you do to save the Show/Edit Dist Field?
2. Calculate the hourly rate for a full time employee with a monthly income of \$5000 and paid bimonthly.
3. What classification does a part-time position fall under?
4. What is the three-fold purpose of the PAYALT screen?
5. Describe how to obtain an Excel file of the position data for an employee.

PAYALT Screen Review

Answers

1. To save the Show/Edit Dist field, you must press the enter key three times.
2. The hourly rate of a person with a monthly income of \$5000 and paid bi-weekly is 28.85.

$$5000 \times 12 = 60000$$

$$60000 / 26 = 2307.69$$

$$2307.69/80 = 28.846 = 28.85$$

3. A part-time person is a secondary position.
4. The purpose of the screen is to know how much an employee is being paid, what position is assigned to him/her and what funding source will be used.
5. After saving the record, send an E-mail to the IFAS OPER to request the Excel file.

Chapter 7: HCCDH

Overview

Introduction HCCDH screen shows the departments only the contributions and deductions for which the employee is eligible. The Hourly information is not used by the county.

Purpose This screen establishes deductions and contributions for the employee.

Objectives

- Describe the required contributions included in the HCCDH screen.
- Identify the required deductions for Payroll.
- Describe other deductions that may be in place for the employee.
- Describe the input for CDH Code Value and CDH Assignment Number.
- Identify procedures for Savings Bonds deductions, deferred compensation deductions and union related deductions on the HCCDH screen.
- Explain the entry for CDH Effective when the assignment is for a change in position.

Contents This chapter contains the following topics:

Topic	See Page
The HCCDH Screen	44
The HCCDH Screen Contributions and Deductions	45
Cont/Ded/Hrs Amount Information	47
HCCDH Review	50

Harris County CDH Screen HCCDH Train B

Personnel Action Code: **NEW**

Entity	Employee ID	SSN	Employee Name	Type	HR	PY
E911	460829782	:				

Notes: [REDACTED] # Rec's: [REDACTED]

CDH Code Value: [REDACTED]

CDH Assignment Number: [REDACTED]

Cont/Ded/Hrs Status	Frequency/PY Type	Box Number
A	A	[REDACTED]

CONT/DED/HR\$ AMOUNT INFORMATION

Cont/Ded/Hrs Effective: [REDACTED] - **12/31/2050**

Amount Expressed As: **E** Amount: [REDACTED] .00

Year to Date: [REDACTED] Period to Date: [REDACTED]

Additional Amt. Effective: [REDACTED] - [REDACTED]

Additional Amount: [REDACTED] .00

Limit Expressed As: [REDACTED] Limit Amount: [REDACTED] .00

Vendor ID: [REDACTED] Obligee's Name: [REDACTED]

Cause No.: [REDACTED] OAG Case No.: [REDACTED]

Special Codes—> 1: [REDACTED] 2: [REDACTED] 3: [REDACTED] 4: [REDACTED]

Approval Code: **WAIT**

Jser ID: **TRAINB** Updated: **2007-12-28 09:42:13** Today:

Help
 Options
 Screen
 Add
 Prev
 Next
 Browse
 Exit

Personnel Action Code

Fig. 7-1 HCCDH

The HCCDH Screen Contributions and Deductions

Identifying deductions and contributions

The HCCDH screen is used for Harris County Contributions, Deductions and Hours. However, Harris County does not use the Hours portion. Contributions are most often made to the retirement fund, but can also be used for allowances or incentives. The required contributions are the TCERS, code 1005, and Disability, code 1006. Examples of deductions are things such as direct deposits, credit union deposits and child support payments. The one required deduction is for Texas Retirement, code 2005.

.

Required Fields

Field	Function
CDH Code Value	This is the code for the type of transaction being indicated. The options from the pick list are: <ul style="list-style-type: none">• CONT for Contribution• DEDU for Deduction
CDH Assignment Number	The CDH Assignment Number field contains the value that corresponds with the CDH code. F1 contains a pick list. To complete this field, <ul style="list-style-type: none">• If the CDH Code value is CONT, you must use a number that begins with one (for example, 1006 for disability contributions).• If the CDH field is DEDU, the assignment number must begin with two (for example, 2005 for retirement benefits). No dollar amount is given for this code.

Continued on next page

The HCCDH Screen Contributions and Deductions continued

Specific deductions

You should be aware of several specific deductions. The first is Union-related, applicable if the employee has contacted the Union and joins. Any changes or cancellations of these deductions require paperwork done by the Auditor's Payroll Department.

Another deduction that may be applicable is deferred compensation. These deductions are created by the employee with a vendor. If a change is made to the deduction, the department can make the change, however paperwork must be sent to the Auditor's Payroll Department.

Any employee wanting deductions for U.S. Savings Bonds must be in touch with the vendor to sign up for the deduction. Changes or Cancellations must be made only by the Auditor's Payroll Department and the employee must contact the vendor before changes or cancellations will be made.

System Derived status field:

Cont/Ded/Hrs Status will always default to A (active).
I designates inactive
O designates override

Cont/Ded/Hrs Amount Information

Required Fields

Field	Function
Cont/Ded/Hrs Effective	<p>The field contains the dates when the assignment will be effective.</p> <p>For a new employee:</p> <ul style="list-style-type: none">• Effective Begin is the date of hire.• The Effective End is 12/31/2050. <p>For changes:</p> <ul style="list-style-type: none">• The Effective Begin is the first day of the pay period in which the assignment is to become active.• The Effective End is 12/31/2050. <p>For terminations: There is no need to enter any changes unless there are certain contributions the employee receives. See <i>Terminations</i> below.</p>
Amount	<p>This is the amount of contribution or deduction for one month.</p> <p>Note: Do not put a dollar sign in this field.</p>

Continued on next page

Cont/Ded/Hrs Amount Information, continued

Terminations If an employee is terminated **from a department** and if he/she enjoys special incentives such as a Car Allowance, be sure to change the effective ending date of that assignment because there are certain types of contributions that are unique to certain Departments. If the effective ending date has not been changed from the 12/31/2050 date, another County Department may not be able to change it.

Hiring If you hire an employee that has no break in service, you will make no changes to the HCDH records. **If there has been a break in service, call the Auditor's Payroll Department** to determine if changes are needed.

Continued on next page

Cont/Ded/Hrs Amount Information continued

**Fields that may
be used by the
Auditor's
Payroll
Department**

Departments cannot enter information into these fields.

- Vendor ID
- Obligee's Name
- Cause No
- OAG Case No
- Special Codes 1-4

Note: Additional Amount defaults to .00.

**Required Field:
Approval
Codes**

An approval Code indicates whether the record has been approved by the Auditor's Payroll Department. This is system-generated.

Wait indicates the record has not been approved. **Send** means that it is approved. Cut off dates for the information put into all CSHREM screens mean that if you do not see a change to SEND in this field and the End Date is near, call the Auditor's Payroll Department immediately.

HCCDH Screen Review

1. For changing a Savings bond deduction, the employee must contact the _____ . The _____ will then make the change.
2. You indicate the purpose of the record (Contribution or Deduction), by completing the _____ field.
3. For every employee, the CDH assignment number is _____ for deductions.
4. The Auditor's Payroll Department will do the paperwork for changes in these deductions:
_____, _____ and _____.
5. For position changes, the effective begin date is the first day of the pay period in which the assignment starts.
6. What fields are required on the HCCDH screen?

HCCDH Screen Answers

1. For changing a Savings bond deduction, the employee must contact the vendor. The Auditor's Payroll Dept will then make the change.
2. You indicate the purpose of the record (Contribution or Deduction), by completing the CDH Code Value field.
3. For every employee, the CDH assignment number is 2005 for mandatory retirement deductions.
4. The Auditor's Payroll Department will do the paperwork for changes in these deductions:

Union dues, US Savings Bonds and deferred compensation.
5. For position changes, the effective begin date is the first day of the pay period in which the assignment starts.
6. CDH Code Value, CDH Assignment number and Cont/Ded/Hrs Effective

Chapter 8: Screen and Fields: MANDDED Screen

Overview

Introduction Some of the employee information on this screen will come from the EMPMSTR screen. The MANDDED screen corresponds to the Employee W-4 or W-5 form.

Purpose The Mandded Screen is used to enter mandatory tax deductions

Objectives

- Identify the purpose of the MANDDED screen.
- Identify the required fields for MANDDED.

Contents This chapter contains the following topics:

Topic	See Page
MANDDED Screen	53
System Derived Fields	54
Tax Fields	55

Mandatory Taxation Screen MANDDED Train B

Personnel Action Code: NEW

Entity Employee ID SSN Employee Name Type HR PY

Notes: # Rec's:

FEDERAL —> Filing Status: S No. of Allowances: 0 —EFFECTIVE DATES—

St: A Fq: A Bx: CDH: 0 Vend: 12/31/2050

CD03: CD04: Amt-Reg: 0.00 Addl: 0.00 12/31/2050

EIC Code: N St: A Fq: Bx: CD03: CDH: 0 12/31/2050

STATE —> Filing Status: N No. of Allowances: 0 —EFFECTIVE DATES—

St: A Fq: A Bx: CDH: 0 Vend: 12/31/2050

CD03: CD04: Amt-Reg: 0.00 Addl: 0.00 12/31/2050

Y/N-C/D-St-Fq-Bx-CD01-Vendor Code-DED#-CNT#-EFFECTIVE DATES

FICA:			A					0	0		12/31/2050
MEDI:			A					0	0		12/31/2050
WCMP:			A					0	0		12/31/2050
SUI:			A					0	0		12/31/2050
SDI:			A					0	0		12/31/2050

Approval Code: WAIT

UserID TRAINB Updated 2007-12-31 08:42:19 Today 2007-12-31 00:00:00 Module:

Help Options Screen Add Prev Next Browse Exit

Enter a personnel action code. Press F1 for a listing.

Fig.8-1 MANDDED

System Derived Fields

Introduction FICA, Medicare, and Worker's Compensation must be included as a deduction for every employee.

System Derived Fields The following fields are system derived.

- Personnel Action Code
- Entity
- Employee ID
- Employee SSN
- Employee Name
- Employee Type
- HR
- PY
- # Recs
- Fq
- Cdh
- Eff. Dt

The Notes field is optional.

Tax Fields

Introduction The Tax fields that are completed are listed in this section.

Required Fields

Field	Function
Federal Filing Status	This field contains the income tax filing status of the employee. Options are listed in the pick list (press F1).
No. of Allowances	This field contains the number of dependant allowances for the employee.
Y/N	The Y/N box defaults Y for FICA, MEDI and WCMP. These fields must be completed with Y. Note: For new hires to Harris County, you must change the default N to Y on the SS/FICA, MEDI and WCMP.

Additional (Addl) Any additional amounts that the employee indicates on the W-4 Form should be entered into the Addl field.

Rehires For rehires who have no break in service, no changes will be made to the MANDDED records. If there has been a break in service, contact the Auditor's Payroll department to determine if any changes should be made to the records.

Chapter 9: LeavINFO Screen

Overview

Introduction The LeavInfo screen may display information that the department did not enter. This information is used for internal calculations such as creditable service hours and the longevity benefit.

Purpose The purpose of this screen is to track types of unpaid leave that affect the DTE hours. Codes are:

- L for General Leave
- M for Military Leave
- S for FMLA

Most fields are system derived.

Objectives You will be able to describe the required fields on the LEAVINFO screen.

Contents This chapter contains the following topics:

Topic	See Page
Required Fields to Complete	57
LEAVINFO Screen	58
Scenarios	59

Required Fields to Complete

Introduction The LeavINFO screen tracks types of unpaid leave that affect the processing of DTE hours.

Required Fields

Field	Function
PCN/Pos	This field populates from the PAYALT screen. If, after tabbing through the field, it is not populated, you must type in the PCN.
ACTN	This field contains the same codes seen in the Personnel Action Codes. Use “NEW” when adding new information in the Add mode. Use UPDATE when changing information in the Browse mode.
Leave	This field indicates the type of leave that the employee is taking. Options are: <ul style="list-style-type: none">• M (military)• L (regular)• S (FMLA)
Approval	This field shows the date that the leave was approved.
Est/Actual Start	This field contains the estimated actual start date of the leave.
Est/Actual Return	<p>This field contains the estimated actual return date of the leave. Without a date, the employee will be considered still on leave, and all benefits will be affected.</p> <p>Note: The date you enter is the last day of the leave, not the date the employee returns to work.</p>

Information to Remember You must always send a Change in Status form to the Auditors Payroll Department to have the employee removed from the leave of absence.

Leave Information Screen			LEAVINFO		Train B	
Entity	Employee ID	SSN	Employee Name		Type	HR PY
		:				
Notes:					# Rec's:	
Former:		DOB:	Loc:			
FY:		PCN/Pos:		/		
AllPCN:	N	Div:	Barg. Unit:			
ACTN	Leave Code and Desc.	Approval	Start	Return	Actual Return	Ret Ben
	If Maternity-Est. DOB:		Actual DOB:		Misc1: 2:	
	If Maternity-Est. DOB:		Actual DOB:		Misc1: 2:	
	If Maternity-Est. DOB:		Actual DOB:		Misc1: 2:	
	If Maternity-Est. DOB:		Actual DOB:		Misc1: 2:	
					Today: 2008-01-09 00:00:00	
Help		Options	Screen	Add	Prev	Next Browse Exit

Enter the entity ID. Press F1 for a listing.

Fig. 9-1 LEAVINFO

Scenarios

Introduction

These three conditions help you understand what to do on the LEAVINFO screen under specified conditions.

Getting paid while on FMLA leave

If an employee has enough ill or vacation hours so that he/she can be paid during the FMLA leave, the LEAVINFO screen will not have entries because the employee is on an informal FMLA leave (is still getting paid during the leave).

Not getting paid while on FMLA leave

In this case, the employee's position is not open; no one will be hired to fill the job while the employee is on FMLA leave. The employee's credited time will not be affected by this break in service. LEAVINFO will not have entries because the employee is on an informal FMLA.

Position available during FMLA leave

In this case, the department wants to hire a substitute for the position left open by the employee. The employee must be put on a Formal FMLA Leave because they cannot have two people on the same position. There **will** be an entry on the LEAVINFO screen.

Chapter 10: Emergency Information

Overview

Introduction This screen stores information related to the employee's contact names and the related telephone numbers. Three records may be entered and viewed at the same time.

Purpose This screen stores the emergency information for an employee.

Objectives Be familiar with the required and optional fields in the EMERGINFO screen.

Contents This chapter contains the following topic:

Topic	See Page
Modes	62
EMERGINFO Screen	62

Modes

Introduction These define the fields on the EMERINFO screen.

Continued on next page

Emergency Information			EMERINFO	Train B		
Entity	Employee ID	SSN	Employee Name	Type	HR	PY
Notes:			# Rec's:			
Associated			EMERNOTE?:			
ACTN	Emergency Contact Name		Relationship	Primary?		
Phone 1/No.: /			Phone 2/No.: /			
Phone 3/No.: /			Phone 4/No.: /			
Primary Provider:			Ph.:			
Phone 1/No.: /			Phone 2/No.: /			
Phone 3/No.: /			Phone 4/No.: /			
Primary Provider:			Ph.:			
Phone 1/No.: /			Phone 2/No.: /			
Phone 3/No.: /			Phone 4/No.: /			
Primary Provider:			Ph.:			
Today:						
Help	Count	Cancel	All	Select	Global	Summary
Exit						

Enter the entity ID. Press F1 for a listing.
Enter search criteria on form then hit Enter

Fig. 10-1 EMERINFO.

Modes, continued

Required fields

Fields	Function
ACTN	This field contains the same codes used before. Use New when adding new information in ADD mode. Use UPDATE when changing information in BROWSE.
Emergency Contact Name	This represents the primary emergency contact designee.
Relationship	This is the relationship of the primary contact to the employee.
Phone Code 1/Num.	The primary emergency contact phone number and extension.
Phone Code2/Num.	The supplemental emergency contact phone number and extension.

Chapter 11: Employee Notes

Overview

Introduction The Employee Notes screen has information related to the employee.

Purpose The Employee Notes screen is used for recording miscellaneous information.

Objectives You will be able to describe the purpose of the Employee Notes screen.

Contents This chapter contains the following topics:

Topic	See Page
Required Field	64
Employee Notes Screen	64
System Generated Fields	65
Screen Review	66

Required Field

Personnel Action Code

This field contains New when adding information in the ADD Mode. Use Update when changing information in the BROWSE mode.

Text Field

Enter information here as a note on the employee.

[illegible]

Fig. 11-1 EMPNOTES

System Generated Fields

Fields Derived from the system

- Entity
 - EmployId
 - SSN
 - Employee Name
 - Type
 - HR
 - PY
 - # Rec's
 - User ID
 - Updated
 - Today
-

MANDDED, LeavINFO, EMERINFO, and EMPNOTES Screen Review

1. True or False. The EMPNOTES screen has one field that can be completed.
2. True or False. It is important to fill in both the primary and supplemental emergency contact number and extension.
3. On the EMERINFO screen, the ACTN field displays the same data as seen in the _____ on other screens.
4. For the LEAVINFO screen, a formal FMLA leave is when the employee (receives, does not receive) pay.
5. When the employee leaves for FMLA and no one will be hired to fill his position, the employee's credited time will not be affected by this break in service. This is called (Informal, Formal) FMLA leave.
6. When a department wants to hire a substitute for a position open because of FMLA, there (will or will not) be an entry on the LeavINFO screen.

Answers

1. True. The EMPNOTES screen has one field that can be completed.
2. True. It is important to fill in both the primary and supplemental emergency contact number and extension.
3. On the EMERINFO screen, the ACTN field displays the same data as seen in the Personnel Action Codes on other screens.
4. For the LEAVINFO screen, a formal FMLA leave is when the employee does not receive pay.
5. When the employee leaves for FMLA and no one will be hired to fill his position, the employee's credited time will not be affected by this break in service. This is called Informal leave.
6. When a department wants to hire a substitute for a position open because of FMLA, there will be an entry on the LeavINFO screen.

Chapter 12: How to Print

Overview

Introduction This section will describe how to print compensation forms and PCN information.

Purpose Printing a copy of the compensation form may be needed. The following information will describe the procedure.

Objectives Describe how to print a compensation form and PCN information.

Contents This chapter contains the following topics:

Topic	See Page
How to print Compensation Forms	69
Printing the PCN information	70

How to Print the Compensation Forms

Required data The query for compensation forms includes the Social Security number (identification number) and the hire date.

HR_Comp_Form To print the compensation form, you must go into the Running Man option. Click on the running man in the menu in the button bar. The next selection is Dept.Employee Maintenance. It is located near the top of the listing.

Open the Dept Employee Maintenance list by clicking on the plus (+) sign. Find HR_Comp_Form. Double-click this item.

Query Enter the employee's Social Security number and the Hire date in the Prompt box that appears. Click OK, and the form appears on the screen.

Note: Make sure there is no error in the query data. You may get a blank form. If that is the case, click the lower X in the upper right hand corner and repeat filling out the Prompt box.

Printing After the complete report appears on your screen, go to File on the menu bar and click Print or click the print icon. Make sure that you are on page 1 before using the print icon; otherwise, only the page you are viewing will print.

Printing the PCN Information

Context	You may need to print the PCN information for a specific Employee. To do this, you need to know the PCN number and the hire date.
Query	Click the running man and double-click the Employee Maintenance folder. Select HR_PCN_HIST (HR PCN GL/JL) A prompt box appears. Enter the PCN number and the beginning date (hire date).
Printing	Press Enter or OK, and the report will appear on screen. To print, click the icon or select File Print from the menu bar. Typos will result in a blank form or an incorrect form.

Chapter 13 : Tracking Equipment

Overview

Introduction This chapter discusses tracking the items that have been checked out to employees. This includes keys, badges, or tools. A database of records stores this information for departments.

Objectives After completing this chapter, you will be able to:

- Describe the general process of tracking equipment for your department.
- Explain how to enter and find records of the equipment checked out by personnel.
- Record the return of the employee's equipment.
- Describe how to access the Equipmnt Screen in the CS module

Contents This chapter contains the following topics:

Topic	See Page
Process of Tracking Equipment	72
EQUIPMNT Screen	74
Completing the EQUIPMNT Screen	75
Reports	79

Process of Tracking Equipment

Introduction The process for tracking equipment may vary from department to department. However, all departments can use the same EQUIPMNT screen. You can access this screen by either CSHREM or CSHRHR. See the process chart below for general flow of actions.

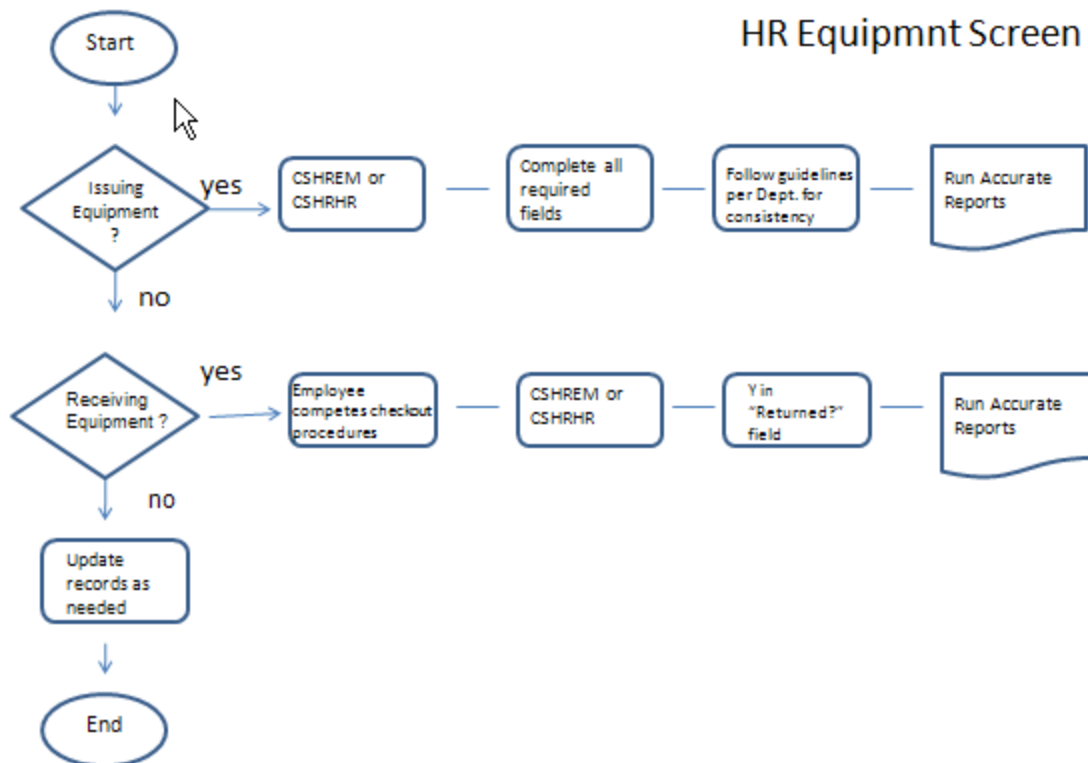


Fig. 13-1

Continued on next page

Process of Tracking Equipment, Continued

Access

Departments will designate certain employees for tracking equipment on the EQUIPMNT screen. Those personnel who have access to CSHREM will be able to access this screen. Another mask, CSHRHR, can bring up this screen as well.

The use of this screen is at the discretion of the Departments.

Access Cutoff (CSHREM)

Because employee maintenance cuts off at noon of the second Tuesday of the pay period until the following Wednesday night, the CSHREM mask is not available. To access the screen, you will need to use CSHRHR. If you believe that you may need to access the screen during this time period, ask for CSHRHR security access, if you do not have it. If you are using CSHRHR, you can access the screen at any time.

Moving to a New Department

If an employee is staying with the county, but moving to another department, and there is equipment remaining to be checked in, you will still be able to see his/her record. However, you will not be able to see the equipment that the new department issues to the employee. And, his new department will not be able to access your records.

Of course, if you have security to the new department, you will be able to view all equipment records coded to that department.

Continued on next page

Process of Tracking Equipment, Continued

Issuing Equipment to an Employee

Using the mask, CSHREM or CSHRHR, you fill in the fields on the EQUIPMNT screen when you want to create a record for an employee. After typing in CSHREM, or selecting it from the Explorer view, press F4 to bring up the list of screens. Arrow down to the EQUIPMNT screen. When you enter via CSHRHR, you are taken directly to the EQUIPMNT screen.

Insight - Harris County Training - [Output]

File Edit View Window Help

Employee Equipment Assignment EQUIPMNT Train C

Entity Employee ID : Employee Name Type HR PY

Hire Date: Termination Date:

Dept.	Equipment Code and Description	Assigned Dt	Returned Dt	Ret'n?
	Detail: AsgnBy: #:			
	Notes: Return Code:			
	Detail: AsgnBy: #:			
	Notes: Return Code:			
	Detail: AsgnBy: #:			
	Notes: Return Code:			
	Detail: AsgnBy: #:			
	Notes: Return Code:			

EMPLOYEE TERM PROC --- ALL EQUIPMENT RETURNED?: Today: 2008-03-06 00:00:00

Help Options Screen Add Prev Next Browse Exit

Enter the entity ID. Press F1 for a listing.

Ready OVR

Fig. 13-2 EQUIPMNT Screen

Completing the EQUIPMNT Screen

Steps to Follow

Step	Action
1.	Enter the Employee's Identification Number (EIN).
2.	The system will fill in the Entity field with one of the codes listed on the F1 pick list. These include: <ul style="list-style-type: none">• E911 for Emergency 911• Elec for Election Workers• FCTL for Flood Control Workers• ROOT for Harris County and CSCD.
3.	Enter the department that is issuing the equipment.
4.	Enter the Equipment Code taken from the pick list. There are two codes that can be used to track user security rather than a physical piece of equipment. The department must maintain this record as well as the non-inventory equipment. The following figure lists the codes for equipment.

Continued on next page

ENTER to select; F1 for text help, F5 to reselect

EQUIPMNT . EQUIP CODE MATCHES % Order/Select: R

Match Count 12 Filter:

COMM	COMMUNICATIONS EQUIPMENT
CMP	COMPUTER EQUIPMENT
CRD	BUILDING ACCESS CARD
CSA	COMPUTER SYSTEM ACCESS
ID	COUNTY ID BADGE
KEY	KEY
OTH	OTHER
SA	SIGNATURE AUTHORIZATION
TLS	TOOLS
UFM	UNIFORM
VEH	VEHICLE
VEQ	VEHICLE EQUIP (PARKING, EZ TAG)

Fig. 13-3 Equipment Codes

Completing the EQUIPMNT Screen, Continued

Steps to Follow (continued)

Step	Action
5.	<p>For any of the classifications, enter more detailed information in the Detail field. It has a total of 20 characters available. You may also use Notes. It contains 72 characters maximum. It can be used for items like quantity, replacement value or who received the equipment when it was returned.</p> <p>Note: You can enter the same equipment code on multiple items. There is nothing that stops you from entering the same exact item twice for the employee. Be careful on data entry.</p>
6.	<p>The Assigned date is an optional field. It represents the date that the equipment was issued to the employee.</p>

Continued on next page

Completing the EQUIPMNT Screen, Continued

Steps to Follow (continued)

Step	Action																		
7.	The Returned DT (Date) is optional and can be related to the Return Code. If the code represents that the item was lost (LO), the Returned Date would be the date when it was lost.																		
8.	Ret'n? is a field that indicates if the item has been turned into the department. N for nor or Y for yes is entered. The field can be Y even though there is no Returned Dt entered.																		
9.	Assigned By is an optional field. You may put in initials up to six characters.																		
10.	"#" is optional and can designate a model number or some specific description of the equipment. CDD reports sort by this # detail.																		
11.	<p>Return Code indicates the status of the equipment. The values follow. If the equipment has a Returned Date or a "Y" has been entered in the Returned? field, this field is required and cannot indicate "currently assigned."</p> <p>ENTER to select; F1 for text help, F5 to reselect</p> <p>EQUIPMNT . RETURNCD MATCHES %</p> <p>Match Count 9 Filter:</p> <table border="1"> <tbody> <tr><td>CA</td><td>CURRENTLY ASSIGNED</td></tr> <tr><td>LO</td><td>LOST</td></tr> <tr><td>LP</td><td>LOST, REPLACEMENT COST PAID</td></tr> <tr><td>NN</td><td>NO NEED TO RETURN</td></tr> <tr><td>RB</td><td>RETURNED IN BAD CONDITION</td></tr> <tr><td>RF</td><td>RETURNED IN FAIR CONDITION</td></tr> <tr><td>RG</td><td>RETURNED IN GOOD CONDITION</td></tr> <tr><td>RU</td><td>RETURNED IN UNUSABLE CONDITION</td></tr> <tr><td>ST</td><td>STOLEN</td></tr> </tbody> </table>	CA	CURRENTLY ASSIGNED	LO	LOST	LP	LOST, REPLACEMENT COST PAID	NN	NO NEED TO RETURN	RB	RETURNED IN BAD CONDITION	RF	RETURNED IN FAIR CONDITION	RG	RETURNED IN GOOD CONDITION	RU	RETURNED IN UNUSABLE CONDITION	ST	STOLEN
CA	CURRENTLY ASSIGNED																		
LO	LOST																		
LP	LOST, REPLACEMENT COST PAID																		
NN	NO NEED TO RETURN																		
RB	RETURNED IN BAD CONDITION																		
RF	RETURNED IN FAIR CONDITION																		
RG	RETURNED IN GOOD CONDITION																		
RU	RETURNED IN UNUSABLE CONDITION																		
ST	STOLEN																		

Fig. 13-4

Reports

CDD Reports

There are three CDD reports for the EQUIPMNT screen. It is very important to complete the screen fields consistently, so that the reports give you easy to read information. For example, if a cell phone has been checked out to an employee, in the detail field, use the same format for every cell phone; that is you can use either: Phone, cell or Cell phone. The sort will be in alpha order according to equipment type.

The three reports are listed in the Equipment folder under the Dept. HR Misc folder. They are highlighted below.

Continued on next page

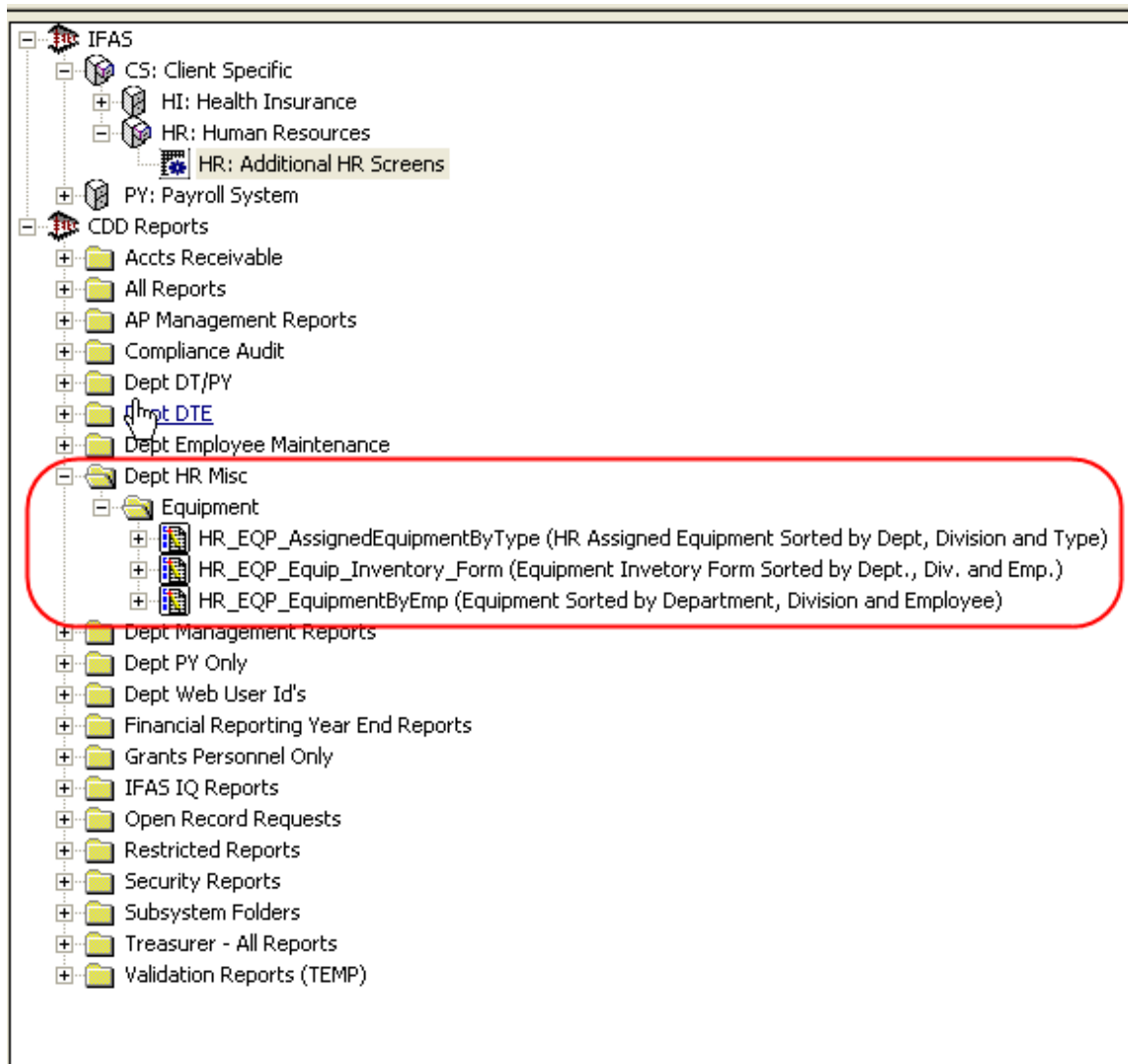


Fig. 13-5 Explorer View of CDD Reports for EQUIPMNT Screen

Reports, Continued

CDD Reports (continued)

Choose the report that will fulfill your needs. Look below at the prompt boxes for each of the reports. All reports have department number and division number as a possible search term.

Report 1

HR_EQP_AssignedEquipmentbyType. This report sorts by the following:

1. Department number
 2. Division number
 3. Equipment type code
 4. Detail
 5. Name
 6. Identification number
 7. # field
-

Continued on the next page

The screenshot shows a Windows-style dialog box titled "Prompts" with a close button (X) in the top right corner. The dialog has a light beige background and contains several input fields and two buttons. The input fields are labeled as follows:

- "Enter a Department Number:" followed by an empty text box.
- "Enter a Division Number:" followed by a text box containing an asterisk (*).
- "Enter an Equipment Type Code:" followed by a text box containing an asterisk (*).
- "Show Notes (Y/N):" followed by a text box containing the letter "N".
- "Page Break on Equipment Type (Y/N)" followed by a text box containing the letter "N".
- "Show Employee ID (Y/N):" followed by a text box containing the letter "N".

On the right side of the dialog, there are two buttons: "OK" and "Cancel". A mouse cursor is visible over the "OK" button.

Fig. 13-6 HR_EQP_AssignedEquipmentbyType Prompt Box

Reports, Continued

Report 1 (continued)

This is the resulting report for the above prompt box.

Continued on next page

ASSIGNED EQUIPMENT BY TYPE JUSTICE OF THE PEACE 1-1 3110 - ADMINISTRATIVE DIVISION				
Detail	Number	Employee Name	Assigned Date	Assigned By
001 - DESK KEY				
DESK ON 12TH FLOOR	334	JONES, MARY	03/08/2008	LCW
001 - DESK KEY COUNT: 1				
002 - BUILDING KEY				
RED KEY TO BACK DOOR		JONES, MARY	02/01/2005	LCW
002 - BUILDING KEY COUNT: 1				
003 - PICTURE ID				
	INCLUDING LANYARD	JONES, MARY	02/02/2005	LCW
COUNTY ID		JOHNSON, ANDRE	03/06/2008	BOBB
003 - PICTURE ID COUNT: 2				
004 - LAPTOP				
DELL LAPTOP	1366453353	MING, YAO	03/06/2008	SHAW
DELL LAPTOP	100000010	STRAWBERRY, DARRELL	03/06/2008	GS
DELL MODEL 12345	2 GIG HARD DRIVE	JONES, MARY	02/08/2006	LCW
004 - LAPTOP COUNT: 3				
3110 - ADMINISTRATIVE DIVISION COUNT: 7				

Fig. 13-7 Assigned Equipment by Type

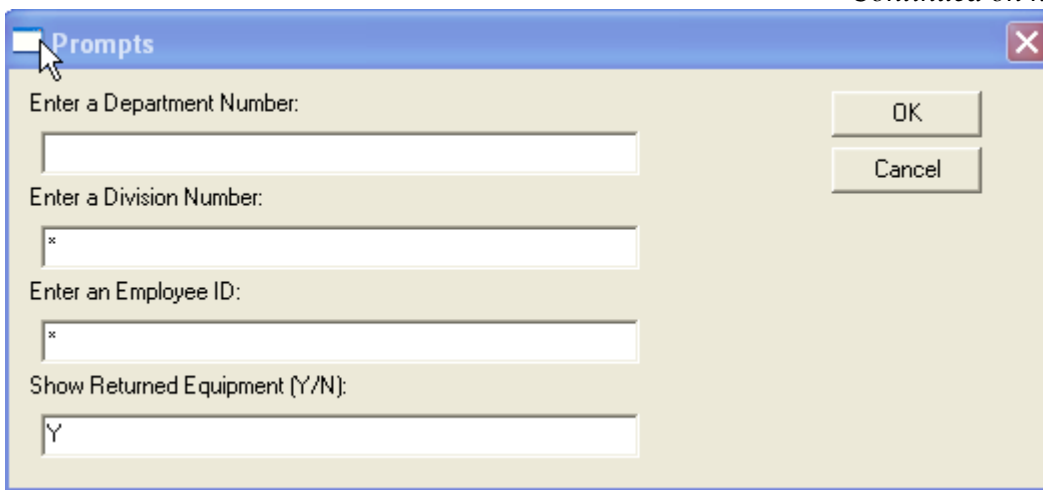
Reports, Continued

Report 2 HR_EQP_Equip_Inventory_Form. This report has fewer search specifications. Sorting is by:

1. Department
2. Name
3. Identification number
4. Equipment Type
5. Detail
6. Assigned date
7. #

This report may be printed for issuing or returning equipment and provides signature lines for the employee and the person issuing or accepting returned equipment.

Continued on next page



Prompts

Enter a Department Number:

Enter a Division Number:

Enter an Employee ID:

Show Returned Equipment (Y/N):

Y

OK

Cancel

Fig. 13-8 HR_EQP_Equip_Inventory_Form Prompt Box

Reports, continued

Report 2 (continued)

The following shows the record and the signature lines for the employee when receiving or returning the equipment.

County Auditor's Form 10 Harris County, Texas (11/07)		HARRIS COUNTY JUSTICE OF THE PEACE 1-1 3110 - ADMINISTRATIVE DIVISION EMPLOYEE ASSIGNED/RETURNED EQUIPMENT INVENTORY FORM				
Employee Name JONES, MARY		Employee I.D.		Hire Date 12/01/2005		
Equipment issued to employee:				Equipment returned by employee:		
Date	Equipment Item (Including keys, badge, etc.)	Model, Serial Number, etc.	Issued By	Date Returned	Condition of Equipment	Received By
03/08/08	DESK KEY DESK ON 12TH FLOOR	334	LCW		01	
02/01/05	BUILDING KEY GREEN KEY	45566	LCW		01	
02/01/05	BUILDING KEY RED KEY TO BACK DOOR		LCW		01	
02/02/05	PICTURE ID	INCLUDING LANYARD	LCW		01	
02/08/06	LAPTOP DELL MODEL 12345	2 GIG HARD DRIVE	LCW		01	
EQUIPMENT RECEIVED ACKNOWLEDGMENT: I acknowledge receipt of all equipment listed above. I understand that I am responsible for the safekeeping of this equipment. In exchange for the use of this equipment and for the sole purpose of fulfilling my job duties as a Harris County employee, I agree to the following: if I lose or damage (by misuse or abuse) any item listed above for which I hereby acknowledge receipt, I may be required to pay for its stated value. I agree and understand that this amount already reflects normal wear and tear of the equipment that I would add in the regular course of County business. I acknowledge and agree that I am required to keep any receipt for payment to Harris County of each item I lose or damage. Whenever I do pay for equipment I lost or damaged, my failure to produce a receipt shall be conclusive proof in any court of law that I have not paid for the item and of my debt to Harris County in the amount stated above.			EQUIPMENT RETURNED ACKNOWLEDGMENT: I acknowledge that the above listed equipment was returned and/or that I have reimbursed Harris County for equipment not returned. I have attached a Harris County Treasurer receipt in the amount of the replacement value.			
Employee Signature _____ Date _____ Witness Signature _____ Date _____ Witness Name Printed _____			Employee Signature _____ Date _____ Witness Signature _____ Date _____ Witness Name Printed _____			
Note: Employees are required to submit a new "Equipment Inventory Form" for all transfers, additions, and deletions of equipment.						
Report: Equipment Inventory Form Sorted by Dept., Div. and Emp. (HR EOP Equip Inventory)				Date: 03/06/2008		
User: Train C (TRAINC)				Time: 15:06:38		

Fig. 13-9 Equipment Inventory Form

Completing the EQUIPMNT Screen, Continued

Report 3 HR_EQP_EquipmentbyEmp. The sort order for this report is:

1. Department
2. Name
3. Identification number
4. Equipment Type
5. Detail
6. #
7. Assigned date

See the search specifications for this report in the following graphic.

Continued on next page

Reports, Continued

Prompts

Enter a Department Number:

Enter a Division Number:

Enter an Employee ID:

Enter an Equipment Type Code:

Enter a Return Code:

Show Notes (Y/N):

Show Employee ID (Y/N):

Show Returned Equipment (Y/N):

Show Equipment Type CSA - Computer System Access (Y/N):

Show Equipment Type SA - Signature Authorization (Y/N):

Page Break on Employee (Y/N):

OK
Cancel

Fig. 13-10 HR_EQP_EquipmentByEmp Prompt Box

Reports, continued

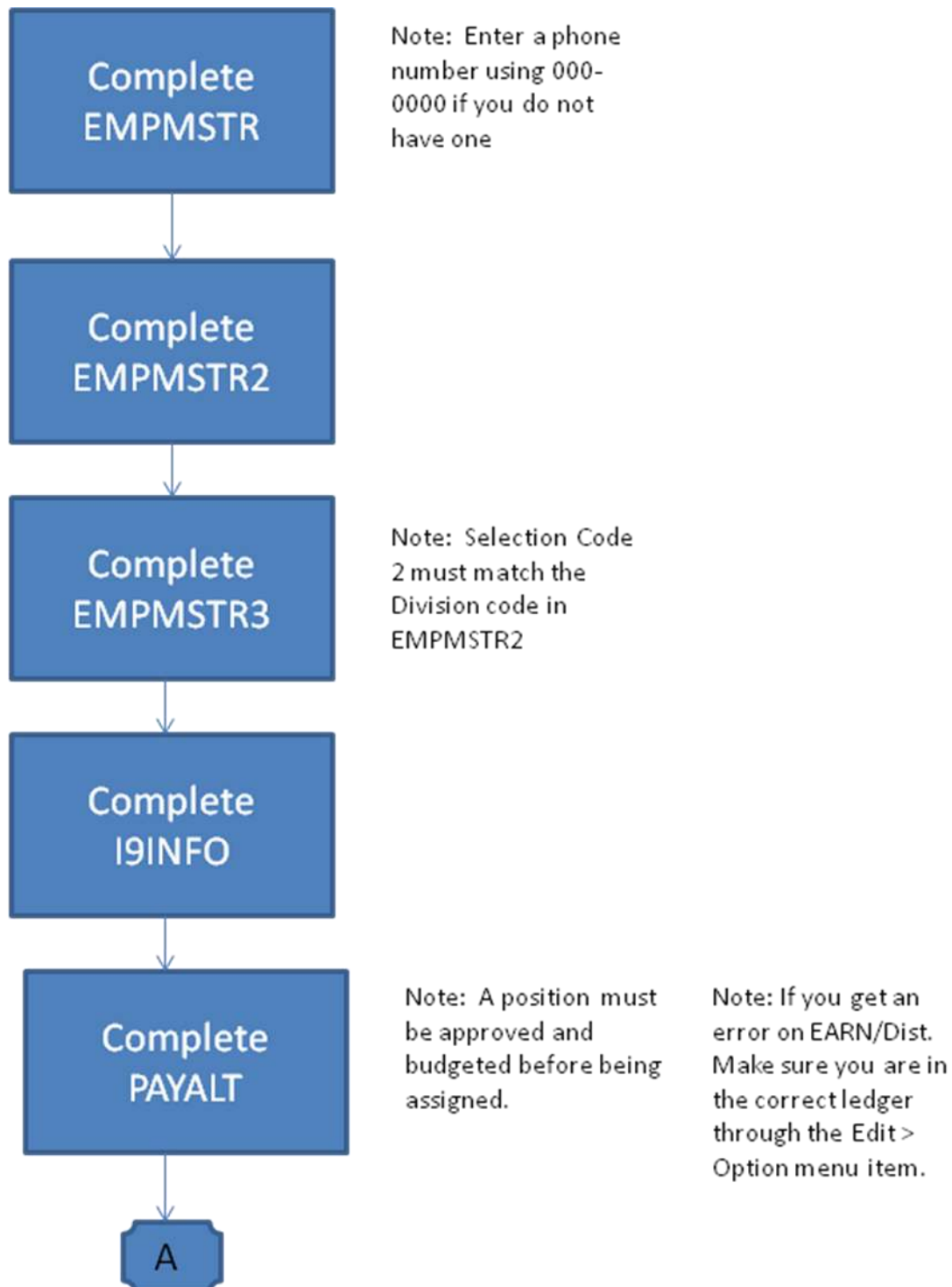
Report 3 (continued)

The following shows the third report's results.

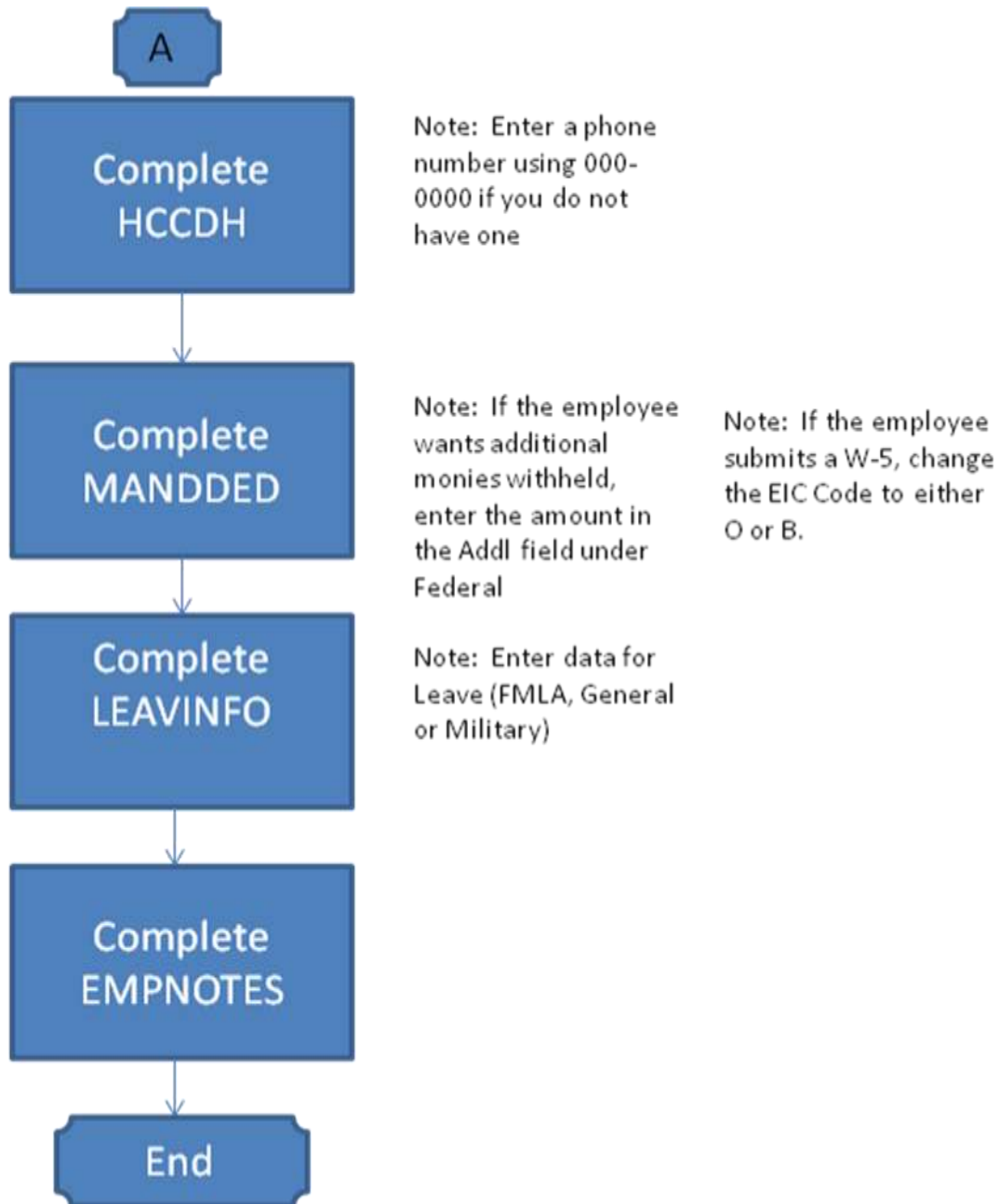
EQUIPMENT BY EMPLOYEE JUSTICE OF THE PEACE 1-1 3110 - ADMINISTRATIVE DIVISION							
Equipment Type	Detail	Number	-----Assigned-----		-----Returned-----		
			Date	By	Date	Code	Flag
111222333 JONES, MARY							
101 - DESK KEY	DESK ON 12TH FLOOR	334	03/08/2008	LCW		01	N
102 - BUILDING KEY	GREEN KEY	45566	02/01/2005	LCW		01	Y
102 - BUILDING KEY	RED KEY TO BACK DOOR		02/01/2005	LCW		01	N
103 - PICTURE ID	INCLUDING LANYARD		02/02/2005	LCW		01	N
104 - LAPTOP	DELL MODEL 12345	2 GIG HARD DRIVE	02/08/2006	LCW		01	N
JONES, MARY - ASSIGNED COUNT: 4 RETURNED COUNT: 1							
3110 - ADMINISTRATIVE DIVISION - ASSIGNED COUNT: 4 RETURNED COUNT: 1							

Fig. 13-11 Equipment by Employee

Practice: Entering a New Employee into IFAS



Practice: Entering a New Employee into IFAS (Cont'd)



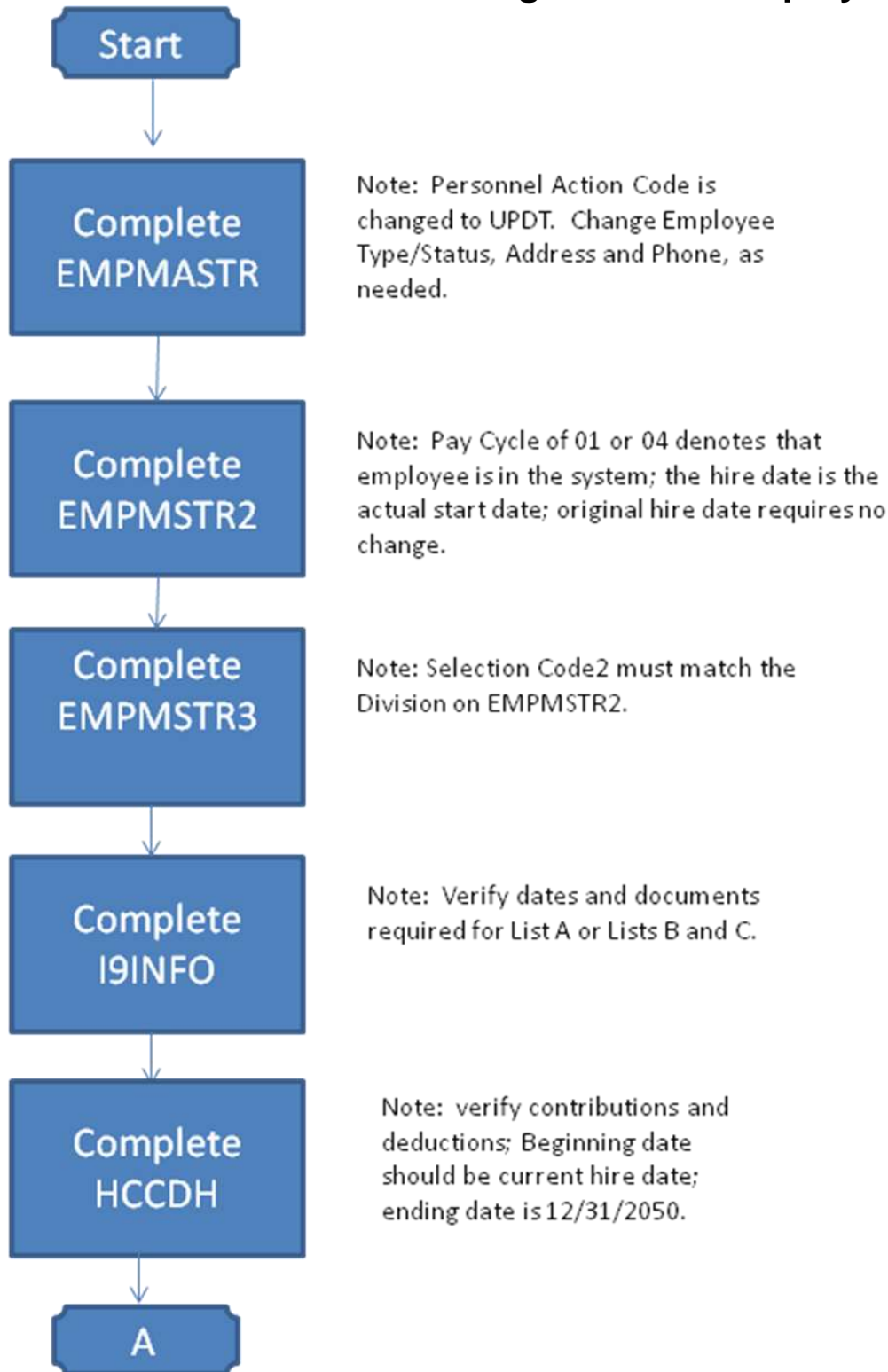
Practice: Rehiring a Harris County Retiree

Introduction The following process is used for an Employee who is retired from Harris County and is rehired into the same Department. This means that he/she has two identities in the IFAS system – one as retired and the other with the old employee number.

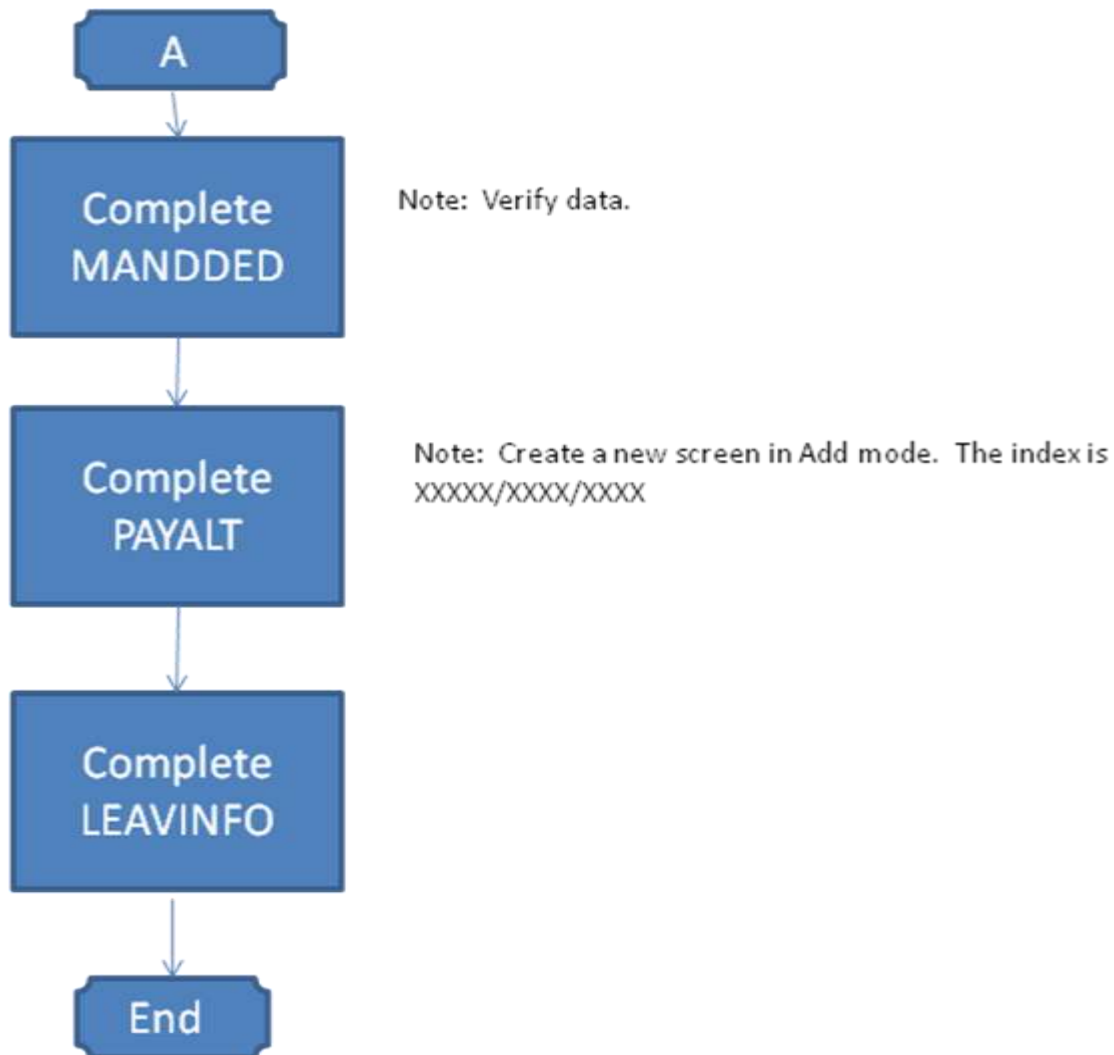
Conditions For retired personnel, the employee's ID is preceded by R. Always enter the ID exactly as it was **before** he/she retired.

If he/she is being hired into a different Department, follow the procedures for transferring to a new department.

Practice: Rehiring a Retired Employee



Practice: Rehiring a Retired Employee (cont'd)



Practice: Rehiring a Former Employee

Introduction

The process for rehiring a former employee is similar to that of rehiring a retired employee. There will be records retained for this employee and they need to be modified. Follow the flow chart for Retired Employees and note the table below for screen differences.

EMPMSTR2

Screen	Description
EMPMSTR2	The Orig. Hire date remains the same if there has been no break in service. If there has been, the Orig. Hire date and the Hire date are identical.

Practice: Employee Transfers to Another Department

Introduction When changing an employee's department, contact the Auditor's Payroll Department. They will change the department code to the new department for the employee.

Conditions You must enter an appropriate Division code on the EMPMSTR2 screen and on the Selection Code 2 on the EMPMSTR3 screen. If no change is made to EMPMSTR3, the change will not show in DTE.

Practice: Entering EQUIPMNT Screen Data and Running Reports

Introduction	This practice will help you learn more about how the EQUIPMNT screen works.
Conditions	Enter data for two employees who are receiving laptops, picture IDs and desk keys. Run the three reports associated with the EQUIPMNT screen and print them.
